

Michael W. Rodman
Marion County Treasurer
200 East Washington Street, Ste 1001
Indianapolis, Indiana 46204-3318

Date: _____

Dear Taxpayer,

Our records show we applied a payment toward the 2007 taxes to property registered in your name and, because more has been paid than was due to date, there are surplus funds.

The most common reasons a surplus is created are as follows:

1. taxes were paid at a real estate closing or a refinancing and again at the due date
2. a correction was made in the amount due after the bill was printed and mailed
3. a payment was made on an incorrect parcel number
4. the original Spring 2007 statement was paid prior to the state ordered reassessment and instructions to pay an amount based on the 2006 statements.

After you research your information, if you find you are not entitled to this surplus, please check option (1) on the claim form. If you know how this surplus occurred and you are certain you are entitled to receive this money, you have two options. Options (2) and (3) on the claim form require proof of payment, to protect us both against false claims. Please submit one of the following forms of proof of payment.

1. a copy of the **front and back** of your canceled check or money order, your mortgage company's check or title company's check that paid taxes on your behalf (*contact the bank, mortgage company, or title company, and request a copy*), or
2. a copy of the front of your check **and** your corresponding bank statement listing the deduction, or
3. a copy of your paid receipt stamped by the bank where you paid or stamped by the Marion County Treasurer if you paid by mail or in person, or
4. a copy of your credit card statement listing payment if paid by credit card, or
5. a copy of your bank statement listing the deduction if paid by automatic debit.

Normally there are two property tax statements per year, but as a result of the state ordered reassessment a third reconciling bill will be due next year. If you select option (2), your overpayment will be applied toward that statement.

To help expedite the processing of your claim, please be certain you fill in all the blanks and return it with proof of payment as soon as possible. If you do not submit a claim, the surplus will be applied toward the reconciling statement due next year. Thank you for your cooperation in this matter.

Cordially,

Records Department
(317) 327-4444

CLAIM FORM FOR SURPLUS FUNDS

The undersigned hereby requests a refund or application of the payment listed below, and further, in consideration of receipt of such refund or application agree to hold the Treasurer of Marion County, Indiana and the Auditor of Marion County, Indiana free and harmless from any and all claims of every kind and description which may be asserted by any party against the Treasurer of Marion County, Indiana and/or the Auditor of Marion County, Indiana because of payment of such refund.

CLAIMANT'S NAME (Printed) _____

AUTHORIZED REPRESENTATIVE (Printed) _____

CLAIMANT OR AUTHORIZED REPRESENTATIVE (Signature) _____

CONTACT ADDRESS _____

CITY/STATE/ZIP _____

TELEPHONE NUMBER (not required but helpful if questions arise) _____

PARCEL/SCHEDULE NUMBER _____

AMOUNT OF SURPLUS FUNDS \$ _____

I SELECT OPTION:

(1) _____ "Not mine to claim"

(2) _____ "Apply my surplus as payment to my reconciling tax statement"

(3) _____ "I am claiming a refund"

Please mail this claim and proof of payment to:
Marion County Treasurer
Records Department
200 East Washington Street, Ste 1001
Indianapolis, IN 46204-3318

Treasurer Office Internal use:

Date mailed _____ by _____

Date received _____

Date approved for payment _____

Date of modification _____